PI - Spreadsheets and Cover Forms for the Request for Medical Record

Purpose:
Provide instruction for creating spreadsheets and cover forms for the medical records to be requested.

Identification of Roles:
IME Program Integrity (PI)—prepare covers forms for each medical record requested.

Performance Standards:
None

Path of Business Procedure:

When a review or review project has been approved and will require review of medical records, the Database Management Administrator works with the Reviewer to create spreadsheets and cover forms for the records to be requested. The Database Management Administrator and the Reviewer will determine the more efficient process case by case. If the quantity can be done manually, the Reviewer creates the spreadsheet (refer to procedure, "Initiating a Request for Medical Records.") If the project is too large to be done manually, the Database Management Administrator is responsible for the following.

Step 1. Run the appropriate query from the Data Warehouse based on the criteria given by the Reviewer and approved by the Supervisor on the Reviewer Recommendation and Project Initiation Form, Form F102_1. Query templates may be found at \\dhsime\SURS\Data Warehouse\Paul\SQL\1 Records Request Templates\DW12. Save the query (.sql) file into the appropriate project folder for the review at \\dhsime\SURS\Data Warehouse\Paul\Reports.

Step 2. Verify the claims pulled in the query above are all final, adjusted claims. Run the appropriate query, based on the claim type, from the following folder: \\dhsime\SURS\Data Warehouse\Paul\SQL\Templates\DW12. Verify both sections of the query return the same totals, and paste a screen shot of the results into a Microsoft Word document. Save this Word document into the appropriate project folder for the review at \\dhsime\SURS\Data Warehouse\Paul\Reports.

Step 3. Save the data set from the query to an .rpt file into the appropriate project folder for the review at \\dhsime\SURS\Data Warehouse\Paul\Reports, and then change the extension to .txt. Import the .txt file into a copy of the database template found at \\dhsime\SURS\Data Warehouse\Paul\DW12 Records Requests.mdb. Save this database file into the appropriate project folder for the review at \\dhsime\SURS\Data Warehouse\Paul\Reports. Using the import data functionality of Microsoft Access, import a HCFA claims data set into the existing table "tblDetailHCFA", a UB92 claims header data set into the existing table "tblDetailUB92, a UB92 claims line item data set into the existing table "tblDetailUB92LineItem", or a Pharmacy claims data set into the table "tblPharmacy". The first two records and the last two or three records will contain "garbage" data, and should be deleted.

Step 4. Set the appropriate filtering criteria in the "qappMRR" based on the Reviewer Recommendation and Project Initiation Form. Update the contact log number field with the contact log number from the corresponding PI Referral e-form in OnBase. Update the "DateOfRequest" field with the correct date to be used on the records request letter sent to the provider. Update the "ReviewerName" field with the reviewer for the project. Run this query to append the needed data records for the cover sheets into the table "tblCoverSheetData."

Step 5. Create the Medical Records Request cover sheets. (This next part of this procedure is documented in part by the CORE unit, as the bar codes on the cover sheets must meet the technical specifications of the CORE Mailroom scanners and OnBase. See the file \\dhsime\IMEUNIVERSAL\SURS Medical Records Requests\Processing\SURS Barcode Process.doc. Adobe Acrobat Professional must be installed on the PC you are using.)

Step 6. Export the table titled "tblCoverSheetData" to the file \\dhsime\IMEUNIVERSAL\SURS Medical Records Requests\Processing\Letter Data.txt, per the specifications in the instructions at the hyperlink in the above paragraph. Follow the remaining instructions at the hyperlink in the above paragraph to print the bar-coded cover sheets.

Step 7. Create the corresponding "spreadsheet" file that is sent to the provider along with the cover sheets. Open the report "rptSpreadsheets" in the Records Requests.mdb file, and ensure the record source is the same table used to create the cover sheets from the steps above. Output this file to an Adobe PDF document, and send it to the reviewer. Because the source data for the cover sheets and "spreadsheet" file is the same table, there should be no chance of errors.

Step 8. Use a systematic approach to ensure accuracy. It is essential that Protected Health Information (PHI), including member name or identification, not be sent to an incorrect provider.

a. Ensure that you are working with only one provider's medical records at a time.

b. Ensure that you do not duplicate or omit any medical records.

FORMS/REPORTS:

Reviewer Recommendation and Project Initiation Form, Form F102_1.

RFP References:

6.1.2.2.6

Interfaces:

MMIS

Attachments:

None